



Staff Tutorials

Paying Bills and Billing Patrons

If a patron wishes to pay a bill, first begin by retrieving the patron's record from the "Circulation" menu and selecting "Retrieve Patron by barcode"

The screenshot shows a web browser window with the address bar displaying `1: mgrl-ma-demo-globaladmin@PIED-AUB-isI.demo.gapines.org`. The browser has a menu bar with `File`, `Edit`, `Search`, `Circulation`, and `Cataloging`. The `Circulation` menu is open, showing a sub-menu with `Check Out`. The main content area is titled `Retrieve Patron` and contains a form with a `Barcode:` label, a text input field, and a `Submit` button.

Using your mouse, place the cursor in the light green “Enter Barcode” box and scan the patron’s library card barcode.

If the patron does not have their library card and you wish to look them up by name, you can select “Search” and “Search for Patron” to obtain the patron record.

The screenshot shows a web browser window with the address bar displaying `1: mgri-ma-demo-globaladmin@PIED-AUB-isl.demo.gapines.org`. The browser's menu bar includes `File`, `Edit`, `Search`, `Circulation`, and `Cataloging`. The top right of the browser window has `Admin (-)` and `Help` links. The main content area is titled `1 Patron Search` and displays a `No Patron Selected` message. On the right side of this message are two buttons: `Search Form` and `Retrieve Patron`. On the left side, there is a `Search for Patron` section containing the following fields and controls:

- `Include inactive patrons?` with an unchecked checkbox.
- `Limit results to patrons in` with a dropdown menu set to `Everywhere`.
- `Last Name:` with a light green input field.
- `First Name:` with a white input field.
- `Middle Name:` with a white input field.
- `Email:` with a white input field.
- `Phone:` with a white input field.
- `ID:` with a white input field.
- `Address 1:` with a white input field.
- `Address 2:` with a white input field.
- `City:` with a white input field.
- `ZIP:` with a white input field.
- `Search` button.
- `Clear Form` button.

After the patron is retrieved, the Patron screen will appear. Any staff alerts about this patron will also appear at this time.

1: mgrl-ma-demo-globaladmin@PIED-AUB-isl.demo.gapines.org

File Edit Search Circulation Cataloging Admin (-) Help

Patron: Smith, Jeremiah

Smith, Jeremiah
(Has Bills) (Has Overdues)

▼Status

Patrons
HCLS-FV
Internet: Filtered
Expires on 2011-03-27

Holds: 1
Available: 0

Bills: \$5.00
Check Outs: 2
Overdue: 1
Long Overdue: 0
Claimed Returned: 0
Lost: 0
Non Cat: 0

▼ID/Contact Info

Library Card: 123456
ID 1: Drivers License
xxxx5777
ID 2:
DOB: 1983-01-01

Day Phone:
Evening Phone:
Other Phone:

OPAC Login: 123456
Email:

▼Mailing Address

1 University Way
Tuscaloosa AL 35401

Check Out

Barcode: [dropdown] [input] [Submit] Due Date: Normal [dropdown]

Barcode	Due Date	Title

Print Receipt Export Copy to Clipboard Save Columns ☐ Strict Barcode ☐ Auto-Print Done

The left pane gives an overview of the patrons account. This will include any Bills, overdue books, etc.

To begin paying bills start by clicking on the “Bills” button at the top right corner of the screen.

The screenshot shows the 'Bills' page for a patron named Jeremiah Smith. The interface includes a left sidebar with status and contact information, a top navigation bar with buttons like 'Bills', 'Check Out', and 'Items Out', and a main content area with a 'Pay Bill' section and a 'Summary' section.

Patron: Smith, Jeremiah
(Has Bills) (Has Overdues)

▼Status
 Patrons
 HCLS-FV
 Internet: Filtered
 Expires on 2011-03-27
 Holds: 1
 Available: 0
 Bills: \$5.00
 Check Outs: 3
 Overdue: 1
 Long Overdue: 0
 Claimed Returned: 0
 Lost: 0
 Non Cat: 0

▼ID/Contact Info
 Library Card: 123456
 ID 1: Drivers License
 xxxx5777
 ID 2:
 DOB: 1983-01-01
 Day Phone:
 Evening Phone:
 Other Phone:
 OPAC Login: 123456
 Email:
▼Mailing Address
 1 University Way
 Tuscaloosa AL 35401

Summary
 Net Balance: 5.00
 - Payment applied: 0.00
 = New Balance: 5.00

Pay Bill
 Payment Type: Cash
 Payment received: 0.00
 - Payment applied: 0.00
 = Change: 0.00

☐ Annotate Payment ☒ Auto-Print

Selected Balance: \$5.00 Un-Selected: \$0.00 Voided: \$0.00

Information
 Title: Georgia
 Last Billing: Overdue materials

Money Summary
 Total Billed: \$5.00
 Total Paid: \$0.00
 Balance Owed: \$5.00

Current Payment
 0.00

Red Items are still Checked Out

In the light green “Payment Received” box enter the amount being paid, and select the payment type from above.

Apply the payment by clicking “Apply Payment!” and a receipt will automatically be printed.

Billing Patrons

Staff can also manually bill patrons for items like copy machine use, printing, lost materials, etc. from the “Bills” button.

Simply click the “Bill Patron” button in the left center portion of the Patron screen and the “Bill Wizard” will appear.

Bill Patron Wizard

Smith, Jeremiah : 123456

Create Bill

Location: Auburn Public Library

Transaction Type: Grocery

Billing Type: Damaged material

Amount: **Damaged material**

Note:

- Deposit fee
- Deposit returned; fee refund
- Fee for checking out a book
- Fee for copies
- Fee for disk
- Fee for faxing
- Fee for interlibrary loan
- Fee for laminating
- Fee for library card
- Fee for lost card
- Fee for placing a hold
- Fee for processing lost library materials
- Fee for room cleaning
- Fee for sending patron bills to collection agency
- Long overdue items
- Lost materials
- Lost/Replacement Cassette
- Miscellaneous
- Miscellaneous charges
- Money advanced to pay for telephone use
- Overdue Reserves charge
- Overdue materials
- Recall overdue
- Returned Check
- Sale items

Cancel Submit this Bill

Staff can select the billing type, leave notes, and set the amount to bill from the Bill Patron Wizard.

Click “Submit this Bill” to apply it to the patrons account.

The new bill will be reflected in the Patron account as shown below

1: mgr1-ma-demo-globaladmin@PIED-AUB-isl.demo.gapines.org

File Edit Search Circulation Cataloging Admin (-) Help

1 Patron: Smith, Jeremiah

Smith, Jeremiah
(Max Bills) (Has Bills) (Has Overdues)

Refresh Check Out Items Out Holds Bills Edit Info Exit

▼Status

Patrons
HCLS-FV
Internet: Filtered
Expires on 2011-03-27

Holds: 1
Available: 0
Bills: \$16.54
Check Outs: 3
Overdue: 1
Long Overdue: 0
Claimed Returned: 0
Lost: 0
Non Cat: 0

▼ID/Contact Info

Library Card: 123456
ID 1: Drivers License
xxxx5777
ID 2:
DOB: 1983-01-01
Day Phone:
Evening Phone:
Other Phone:
OPAC Login: 123456
Email:

▼Mailing Address

1 University Way
Tuscaloosa AL 35401

Summary

Net Balance 16.54
- Payment applied 0.00
= New Balance 16.54

Bill Patron History

Pay Bill

Payment Type Cash
Payment received 0.00
- Payment applied
= Change 0.00

☐ Annotate Payment ☒ Auto-Print

Selected Balance: \$16.54 **Un-Selected:** \$0.00 **Voided:** \$0.00 Red Items are still Checked Out

Information	Money Summary	Current Payment
<input checked="" type="checkbox"/> Type: grocery Last Billing: Lost/Replacement Cassette	Total Billed \$11.54 Total Paid \$0.00 Balance Owed \$11.54	0.00
<input type="button" value="Full Details"/> <input type="button" value="Add Billing"/> <input type="button" value="Void All Billings"/>		
<input checked="" type="checkbox"/> Title: Georgia Last Billing: Overdue materials	Total Billed \$5.00 Total Paid \$0.00 Balance Owed \$5.00	0.00
<input type="button" value="Full Details"/> <input type="button" value="Add Billing"/> <input type="button" value="Void All Billings"/>		